

We will begin shortly.

We appreciate your patience...



TBM Council Standards Open Forum

November 9, 2022



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Join the TBM Council

- Join online at <http://www.tbmcouncil.org/join>
- Benefits include:
 - Connect with peers from our member community
 - Attend our annual global conference and regional events and networking groups
 - Access best practices and other resources on our community site
 - Take advantage of the TBM Council's education offerings and certification program
 - Take pride in contributing to the rapidly growing discipline of Technology Business Management



Be Sure to Engage Online



- Join on TBM Connect to:
 - Access past meetings recordings and presentations
 - Engage with the 300+ other Strategy Community members
 - Receive invitations to future meetings
 - Stay up to date with Community discussions

[Join the conversation on TBM Connect](#)

A screenshot of the TBM Framework & Taxonomy community page on TBM Connect. The page has a dark blue header with the title 'TBM Framework & Taxonomy' and a 'Settings' button. Below the header is a 'Community Navigator' sidebar with links for 'Community Home', 'Discussions', and 'Files'. The main content area is divided into sections for 'TBM Taxonomy V4.0', 'TBM Taxonomy V3.0', 'TBM Taxonomy V2.1', 'TBM Taxonomy V2.0', 'TBM Taxonomy V1.0', and 'Recent Shared Files List'. Each taxonomy version section lists 'Definition (PDF)', 'Conceptual Graphics (PPT)', and 'Spreadsheet (XLS)'. The 'Recent Shared Files List' section includes a 'Add' button. On the right side, there is a 'Latest Discussions List' section with a 'Add' button, featuring a discussion titled 'Standards Open Forum on June 22! Reserve your spot ...' by Niketa Purandare, and another titled 'TBM Council Awards - Submit Now!'. At the bottom, there is a 'TBM COUNCIL' banner with navigation links for 'Home', 'Who We Are', 'Get Involved', and 'Learn TBM'. Below the banner is a section for 'TBM Connect Communities' with a description of the communities and a list of links for 'Strategy Communities' and 'For Vertical Industries'.

Improved Accessibility to TBM Taxonomy Materials



TBM Council Team Contact Us Membership

TBM COUNCIL Home Who We Are ▾ Get Involved ▾ Learn TBM ▾

The Industry's First Hierarchical Taxonomy of IT Services, Towers, and Cost Sources

DOWNLOAD THE TBM TAXONOMY (VERSION 4.0)

To promote alignment between IT Finance and Business Unit leaders, TBM provides a standard taxonomy to describe cost sources.

Bookmark Link!

<https://www.tbmCouncil.org/learn-tbm/tbm-taxonomy/>

TBM Taxonomy Vertical Extensions

In 2019, the TBM Council Industry Strategy Communities (governed by the Standards Committee) each created an extension to the TBM Taxonomy.

Log into TBM Connect to view the following TBM Taxonomy Extensions:

STATE GOVERNMENT INSURANCE BANKING HEALTHCARE MANUFACTURING

Topics for Today's Session (45 mins)



0:00 – 0:05 | **Welcome & Housekeeping**
Lindsay van Brocklin

0:05 – 0:40 | **TBM Integration Models**
(15 mins) **TBM & Agile** by
John Wilson, MetLife and
Kelley Wendelborn, Lowe's
Companies Inc.

(15 mins) **TBM & ServiceNow**
CSDM by Matt Temple, Accenture

0:40 – 0:45 | **Q&A and Wrap-Up**





TBM Integration Models: Agile & Product Thinking

John Wilson

VP, Technology Transformation, MetLife

Kelley Wendleborn

Sr. Manager of TBM, Lowe's Companies Inc

Intersecting Disciplines – TBM, Agile, & Product Management



Complimenting Not Competing Constructs in Value Creation

Technical Business Management

Increased transparency of technology financials and value delivery

Agile

Increased value delivery via persistency, iteration, enablement, & feedback

Product Management

Increased customer value through holistic ownership over product lifecycle

Agile Delivery Fits Inside Technical Business Management

- TBM includes the tower **Application** and sub-towers **Application Development**, and **Application Support & Operations**
- Agile practices manifest as an alteration to how execution occurs within this space
 - Ex: How teams are organized, how work is planned and executed, etc.

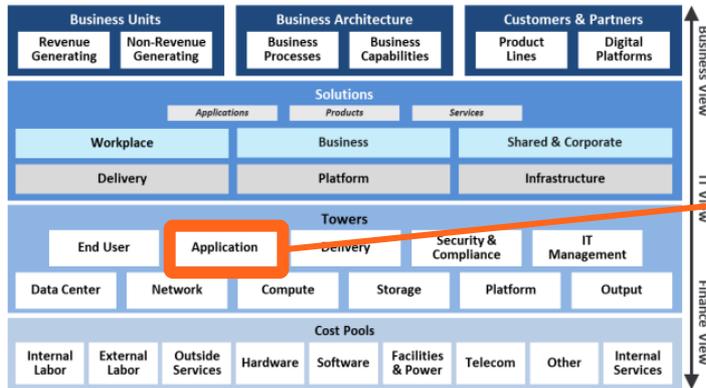


Figure 1: The TBM Taxonomy (Summary View)

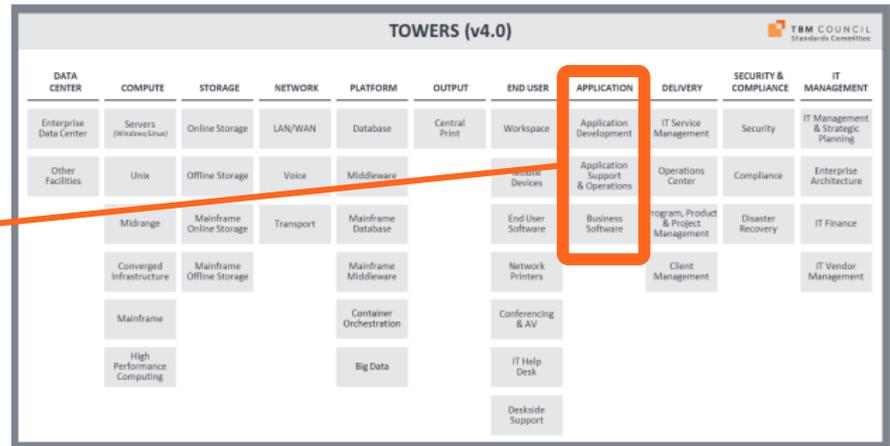


Figure 4: TBM Taxonomy Tower and Sub-Towers

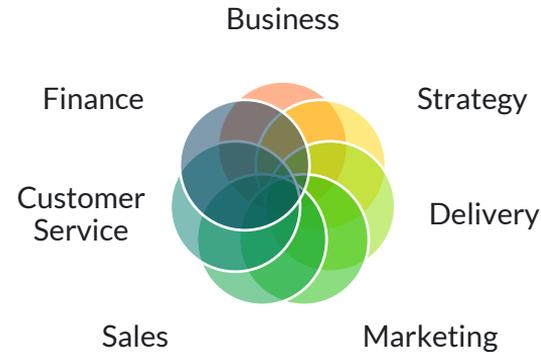
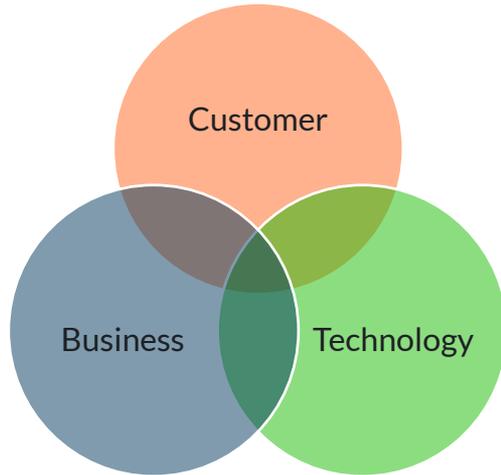


Note:

- Agility can inherently change unitization, budget, forecast, internal billing, and/or benchmark
- These adjustments can be addressed much like other offerings within the taxonomy

Technical Business Management Fits Inside Product Management

- Product Management, seeking to increase value through holistic management, includes Technology often as a subset
- TBM can enhance awareness of financial and value delivery for the associated Technology



Note:

- Product Management has varying definitions in industry (ex: go-to-market vs internal products)
- Regardless of context, *intent* usually aligns on broadening context and increasing accountability

In Conclusion...of an Intro



Usage of One Discipline is not a Deterrent for Entrant to Another

- While language, constructs, and intents can vary...
- TBM, Agile, and Product Management can make for a complimentary management tool kit



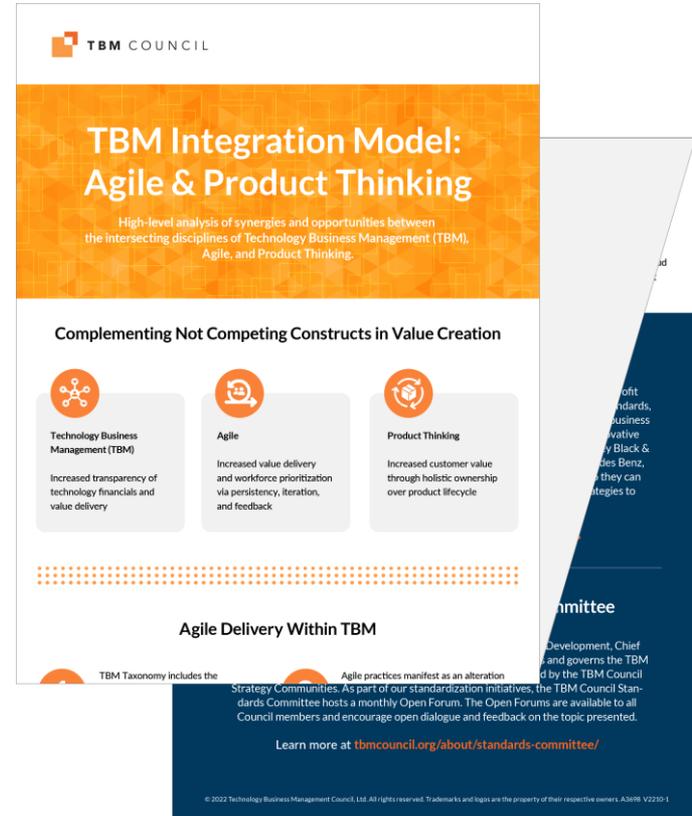
Note:

- “Words have a magical power. They can either bring the greatest happiness or the deepest despair.” – Freud
- Different frameworks will use different vocabulary – prioritize internal alignment over industry alignment

TBM Integration Model: Agile & Product Thinking

Now available online:

- ▶ Available on the TBM Council Resource Center.
- ▶ TBM Council members also have access to this infographic through TBM Connect. Visit the "TBM Framework & Taxonomy" community.
- ▶ Scan the QR Code to view the full infographic



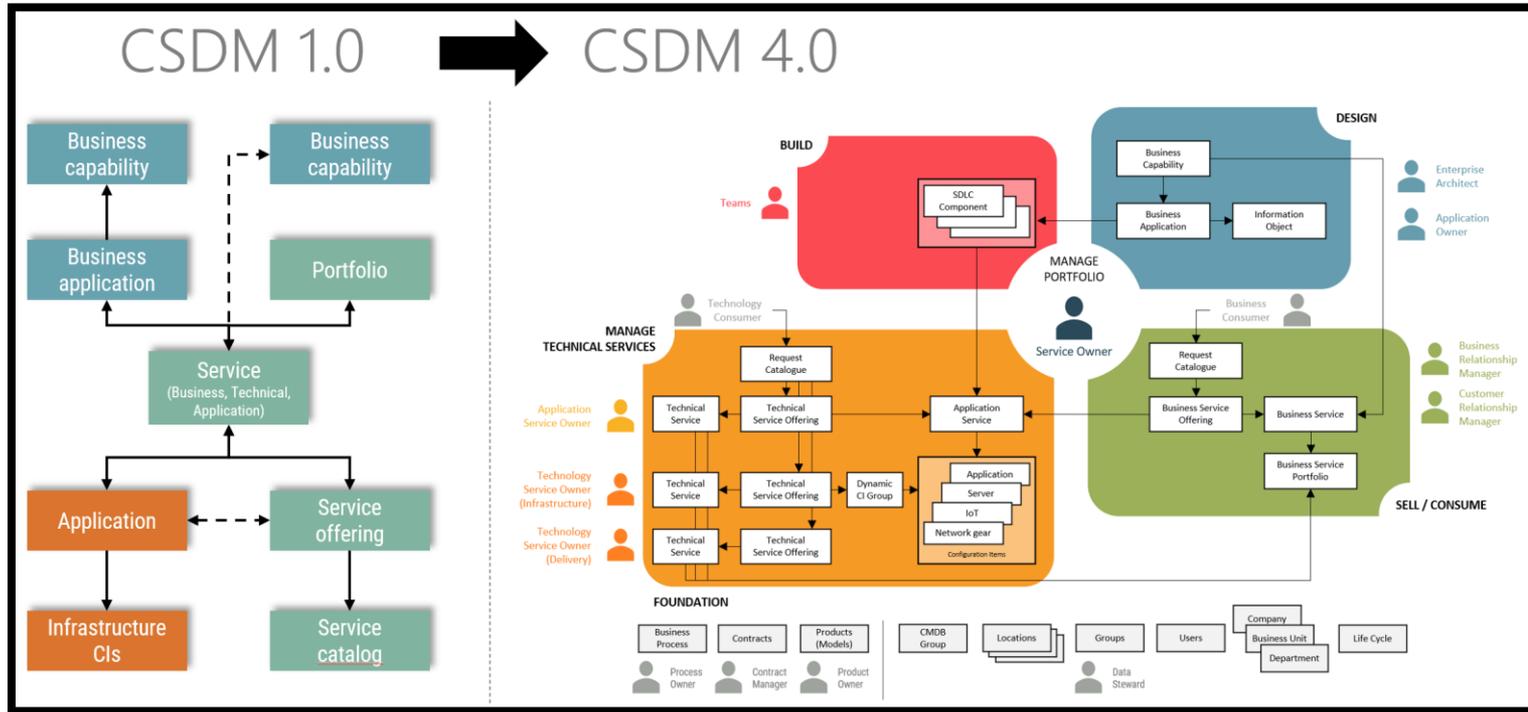


TBM Integration Model: ServiceNow CSDM

Matt Temple

Transformation Excellence Manager, Accenture

CSDM Evolution

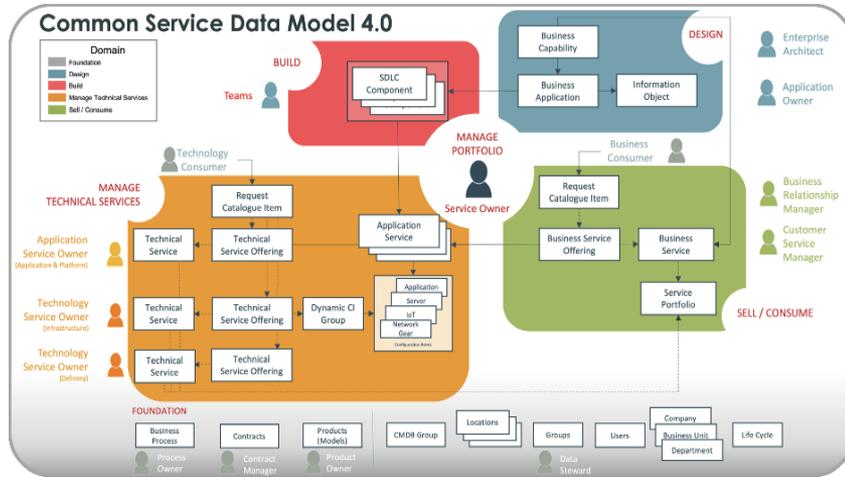


- "ServiceNow CSDM: Evolution & CSDM Examples." *The DCM Blog*, Qualdatrix Ltd, <https://datacontentmanager.com/servicenow-csdm-example-data-models>.

Common Service Data Model (CSDM)

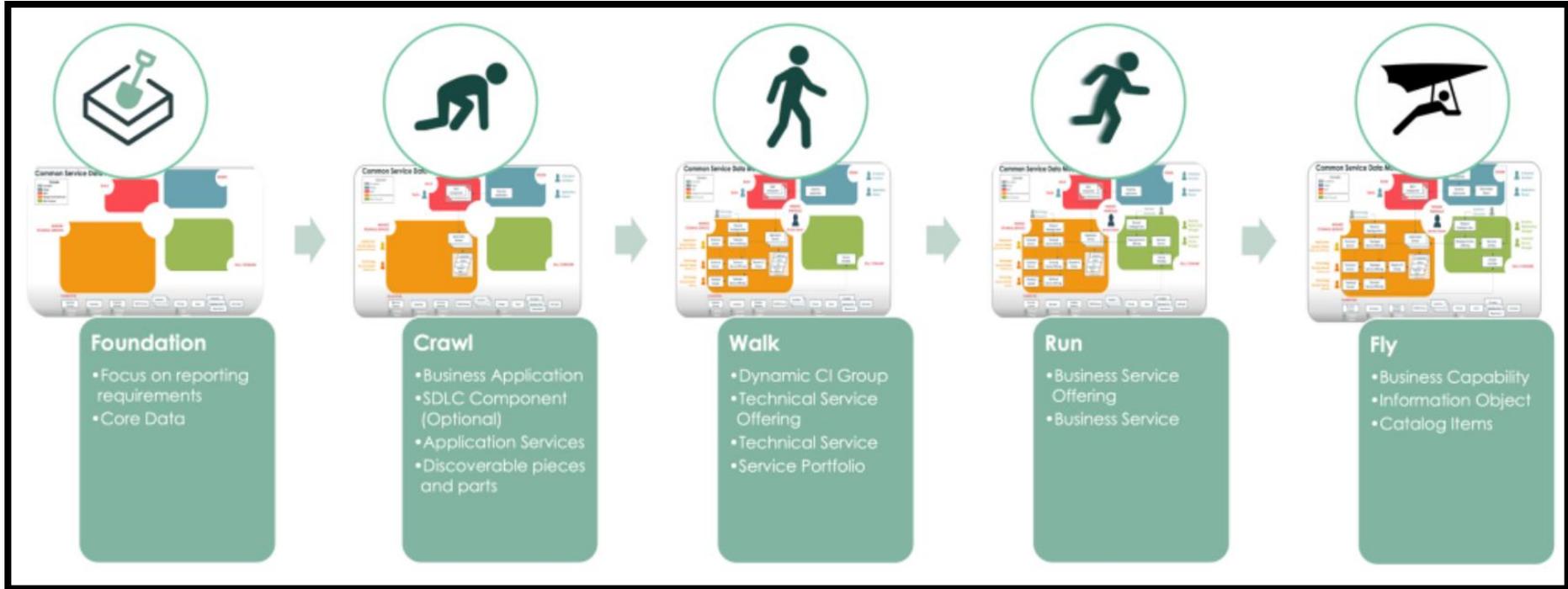
A standard and shared set of service-related definitions across ServiceNow products and platform that will enable and support true service level reporting while providing prescriptive guidance on service modeling within the CMDB.

The data model is a CMDB framework across ServiceNow products and platform that will enable and support multiple configuration strategies.

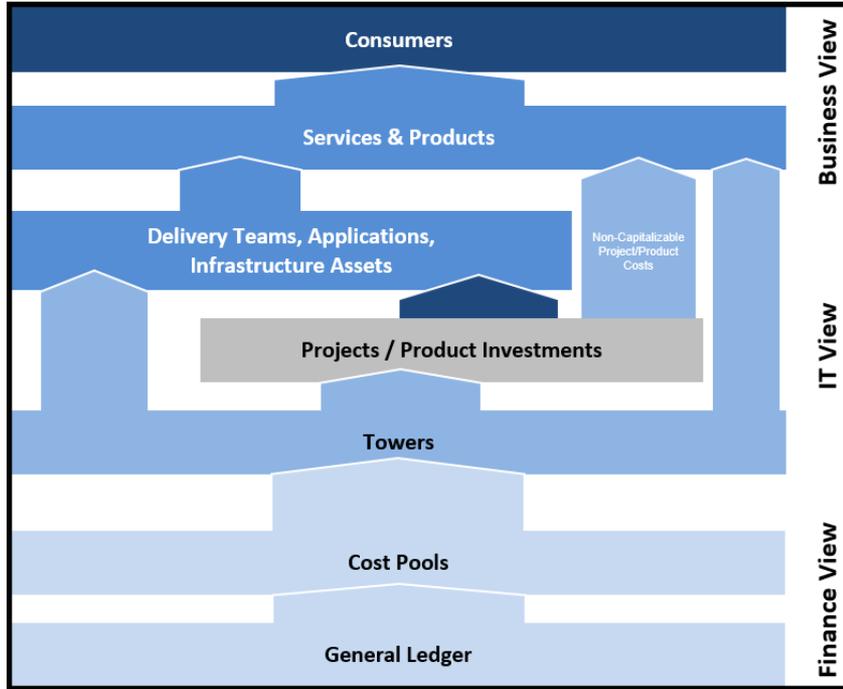


- Lemm, Scott. "CSDM 4.0 Draft White Paper." ServiceNow, 18 Jan. 2022.

Which phase are you in?



TBM Standard Model

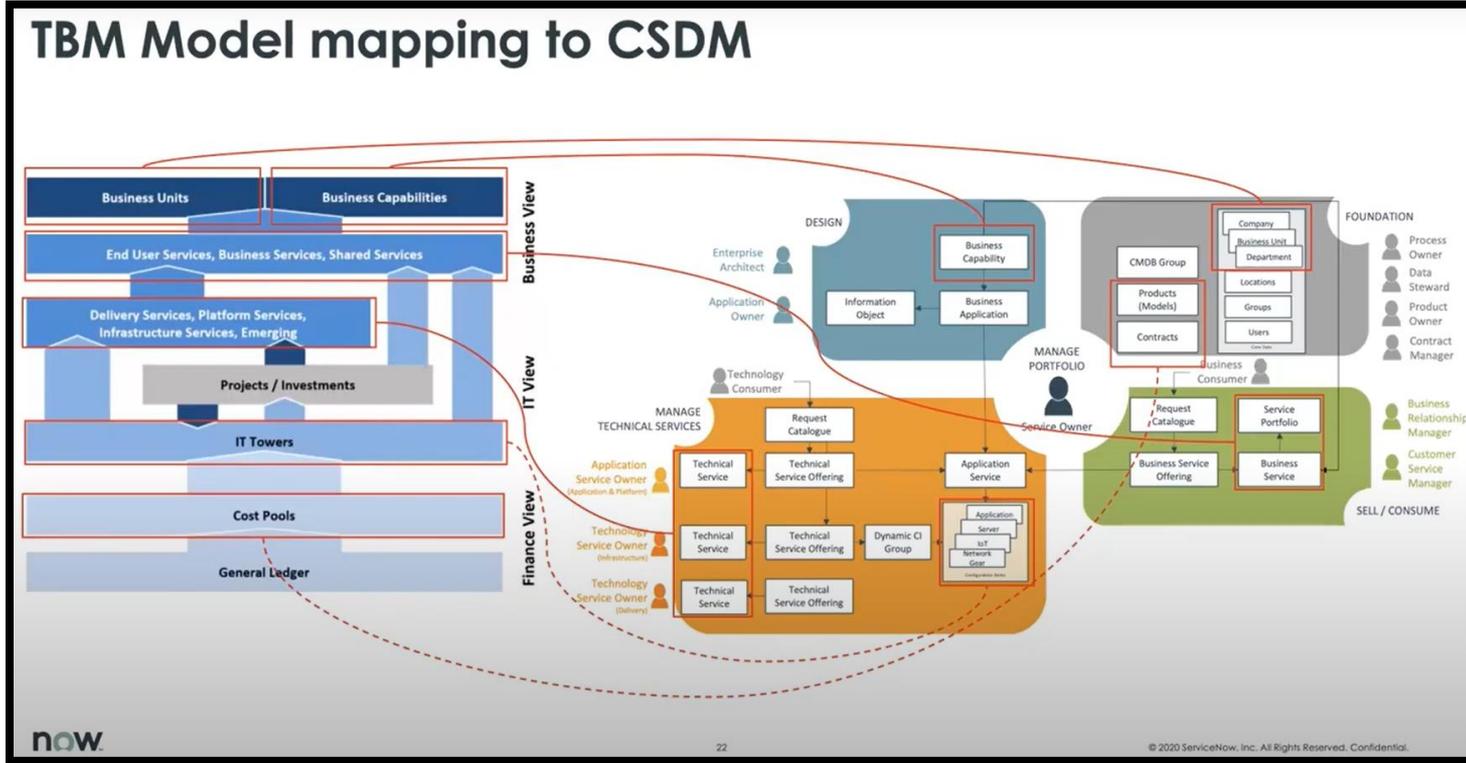


TBM is a value-management framework instituted by CIOs, CTOs, and other technology leaders.

TBM provides a standard taxonomy to describe cost sources, technologies, IT resources, and solutions.

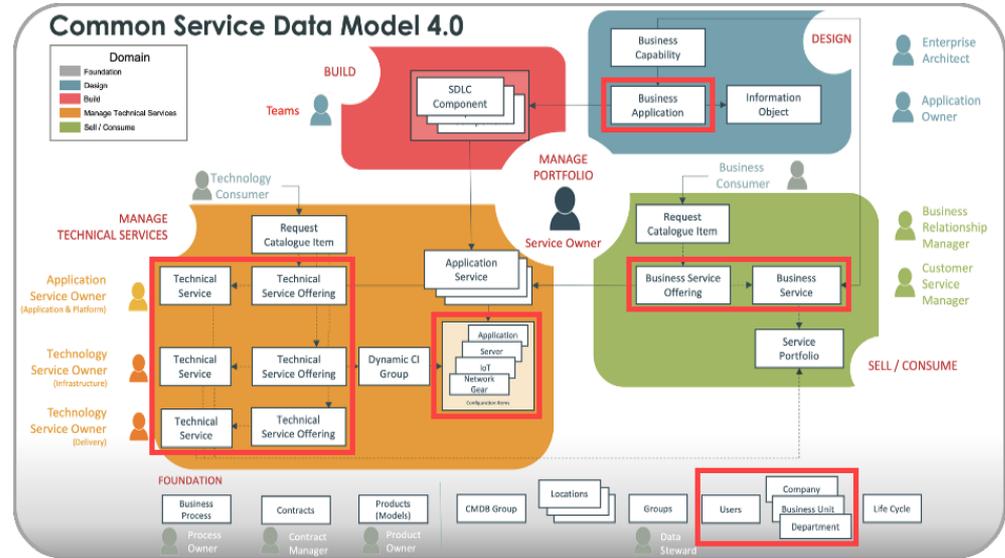
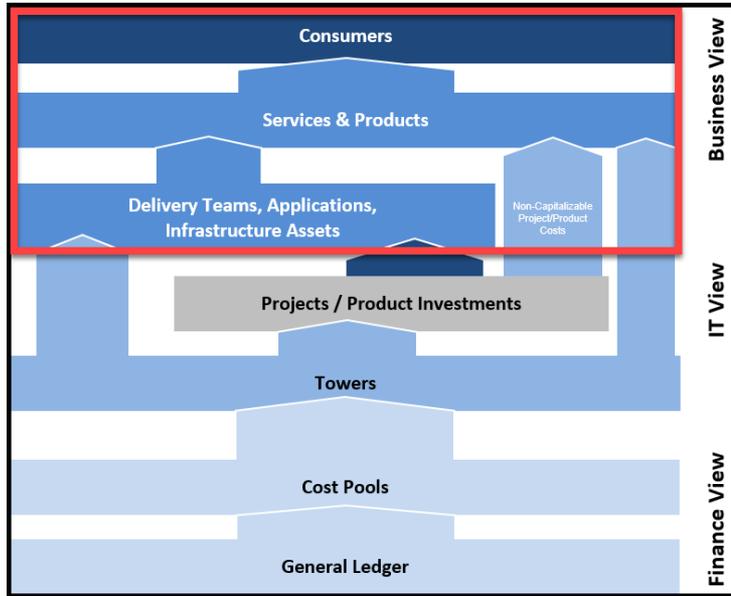
The taxonomy provides the ability to compare technologies, resources, and solutions to peers and third-party options.

ServiceNow's Suggested Mapping

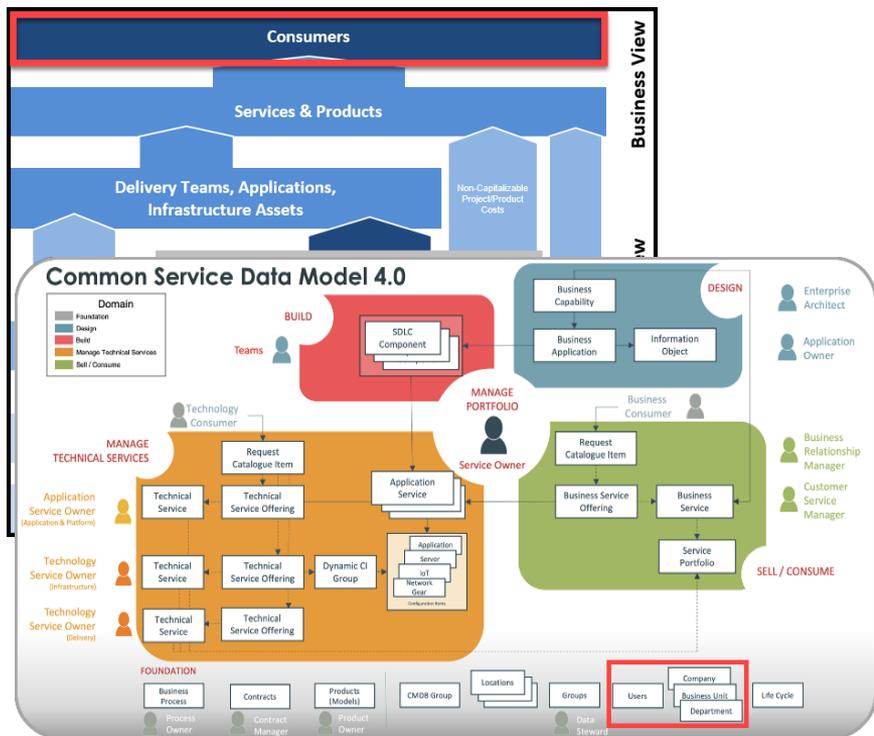


- Bodman, Mark. "CSDM V3 Framework Mapping: TBM Council 3.02." *YouTube*, ServiceNow, 9 Apr. 2021, <https://www.youtube.com/watch?v=I1zjjmh6xt8>.

Primary Integration Areas



Consumers



TBM

SNow CSDM: CMDB Table

Consumer (attributes)

Company: core_company
 Business Unit: business_unit
 Department: cmn_department
 Users: sys_user

NOTE: A Foundation element (eg Company, Users, Locations, Life Cycle) can be related to most, if not all, elements in any other domain.

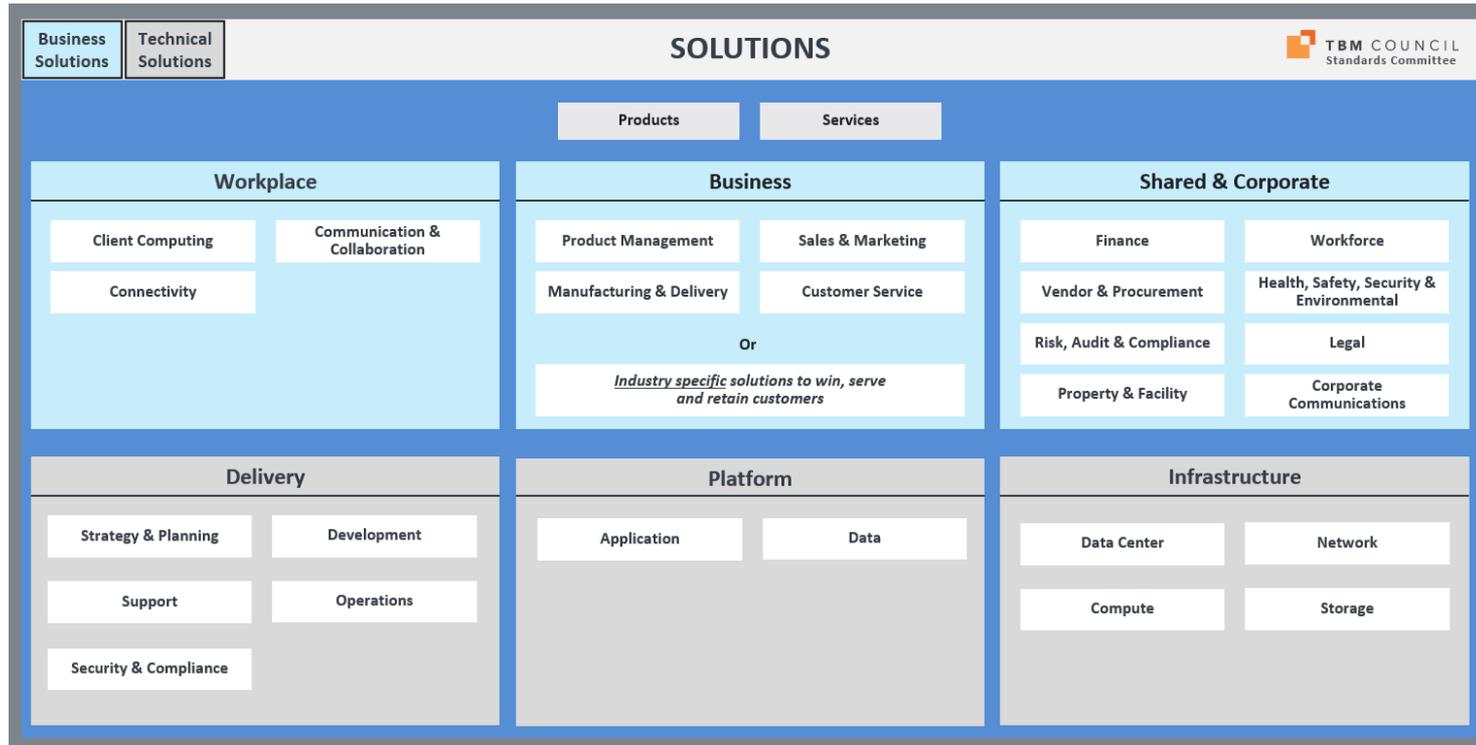
RECOMMENDATION #1: In your TBM tool, enhance the data obtained for Company, Business Unit, Department, Users, and other Foundation elements with data pulled from other systems of record (eg Workday, SAP, Oracle Financials, Active Directory). Frequently, a ServiceNow CMDB's Foundation data is limited to information it needs to function and excludes information required for TBM success.

- "Common Service Data Model Domains." *ServiceNow Product Documentation*, ServiceNow, <https://docs.servicenow.com/bundle/tokyo-servicenow-platform/page/product/csdm-implementation/concept/csdm-domains.html>.

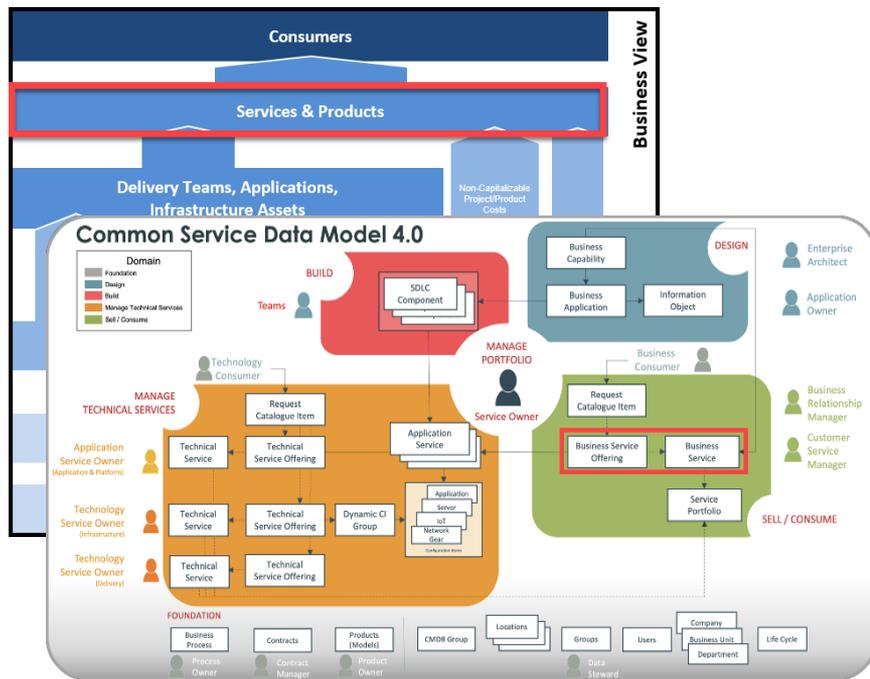
What is a Solution?

- A **Solution** is a generic reference to a **Service** or a **Product**.
- **Service** is the means of delivering value to customers by facilitating outcomes customers want to achieve without ownership of specific costs and risks nor awareness of underlying resources and processes needed. Services can comprise of none, one, or many Applications and/or other Services.
- **Product** is alternative label used for a Service. Typically, Product is used exclusively by Agile teams and IT organizations organized as a DevOps practice. A Product is not equivalent to an Application nor Application Family. See Service for further information.

Have you adopted the TBM Solutions Taxonomy?



Business Solutions



TBM

SNow CSDM: CMDB Table

Solution Offering

Business Service Offering: service_offering

Service Classification = "Business Service"

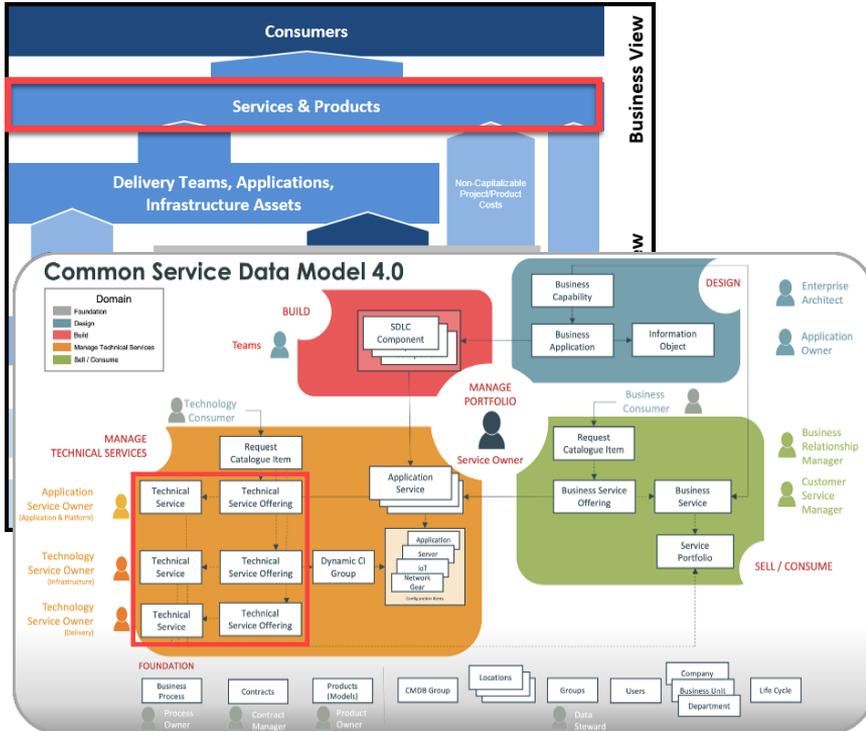
Solution Name

Business Service: cmdb_ci_service

RECOMMENDATION #2: Use the standard TBM Solution's Name (tier 3) values belonging to the Business, Workplace, and Shared & Corporate Solution Types (tier 1) to establish initial values for the CMDB's Business Service table.

- "Common Service Data Model Domains." *ServiceNow Product Documentation*, ServiceNow, <https://docs.servicenow.com/bundle/tokyo-servicenow-platform/page/product/csdm-implementation/concept/csdm-domains.html>.

Technical Solutions



TBM

SNow CSDM: CMDB Table

Solution Offering

Technical Service Offering: service_offering

Service Classification = "Technical Service"

Solution Name

Technical Service: cldb_ci_service_technical

NOTE: A Foundation element (eg Company, Users, Locations, Life Cycle) can be related to most, if not all, elements in any other domain.

RECOMMENDATION #3: Use the standard TBM Solution's Name (tier 3) values belonging to the Delivery, Platform, and Infrastructure Solution Types (tier 1) to establish initial values for the CMDB's Business Service table.

- "Common Service Data Model Domains." *ServiceNow Product Documentation*, ServiceNow, <https://docs.servicenow.com/bundle/tokyo-servicenow-platform/page/product/csdm-implementation/concept/csdm-domains.html>.

Recommendation #4

Expand the TBM Solutions Taxonomy to meet your organization's needs.

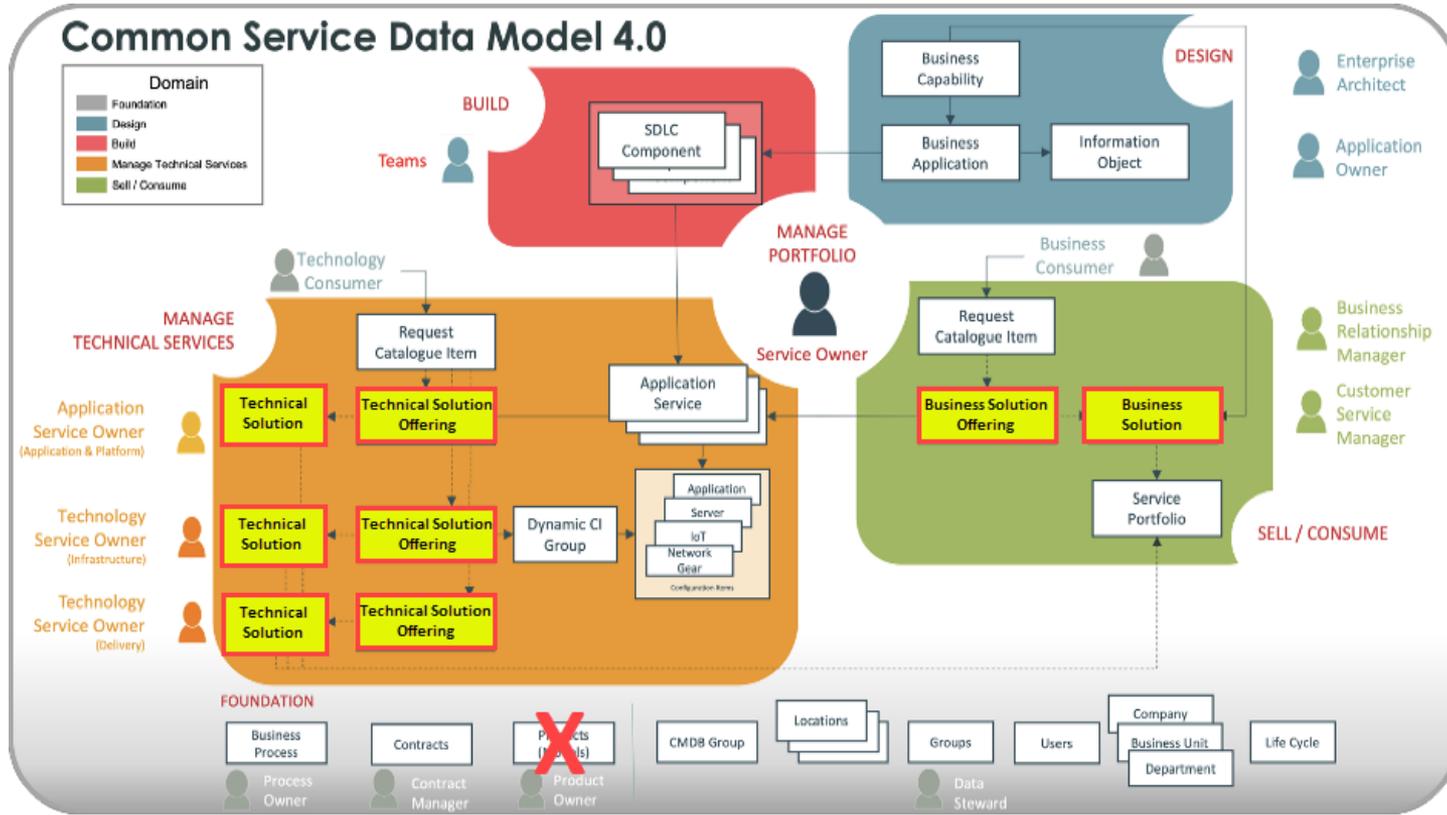
Guidelines:

1. After exhausting existing options, expand the Name (tier 3) level.
2. Offering (tier 4) is 100% custom, so add as many offerings as needed.

Recommendation #5

- Adopting, will adopt, or fully embraced using products...
 - Register products **and** services into Technical/Business Service Offerings.
 - In Technical/Business Service Offering records' schema **and** your TBM Solutions Taxonomy's Offering (tier 1), add a **Sub-Classification** (or **Offering Type**) attribute to define the record as a "Product" or a "Service".

CSDM Viewed with “Solutions”



What is an Application?

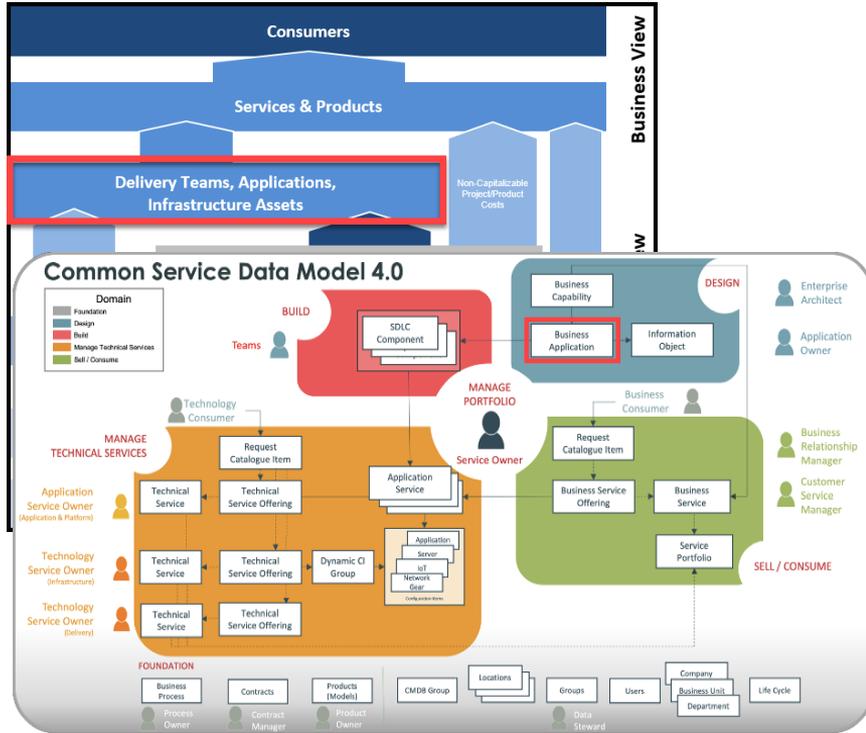
Identifiable software or tightly coupled software components providing functions required by a Solution (eg Service, Product).

An Application may be part of one or more Solutions, but can only be associated to one Application Family.

An Application is ran or hosted on one or more Servers or Clients (including Cloud instances).

NOTE: An Application is not equivalent to a Solution, but can be a component of a Solution of the same name.

Applications



TBM

SNow CSDM: CMDB Table

Application

Business Application:
cldb_ci_business_app

ADDITIONAL NOTES

Although “Business” appears in the name the table should include logical representations of all applications in the organization’s application registry or ServiceNow’s APM, if in use. The reference to “Business” is applied to the whole organization (inclusive of Technology).

Do not use data from the cldb_ci_appl table when collecting a list of applications for your organization. Each record in the cldb_ci_appl table, per ServiceNow’s CSDM product documentation, represents a specific version of software in use installed on a server...not a logical representation of an application.

- “Common Service Data Model product view Application Portfolio Management.” *ServiceNow Product Documentation*, ServiceNow, <https://docs.servicenow.com/en-US/bundle/tokyo-servicenow-platform/page/product/csdm-implementation/reference/apm-use-case.html>.

Recommendation #6

Treat Applications as part of the Infrastructure domain not part of the Solutions Taxonomy (where Services and Products are found).

“You can decommission the application, but the service may live on!”

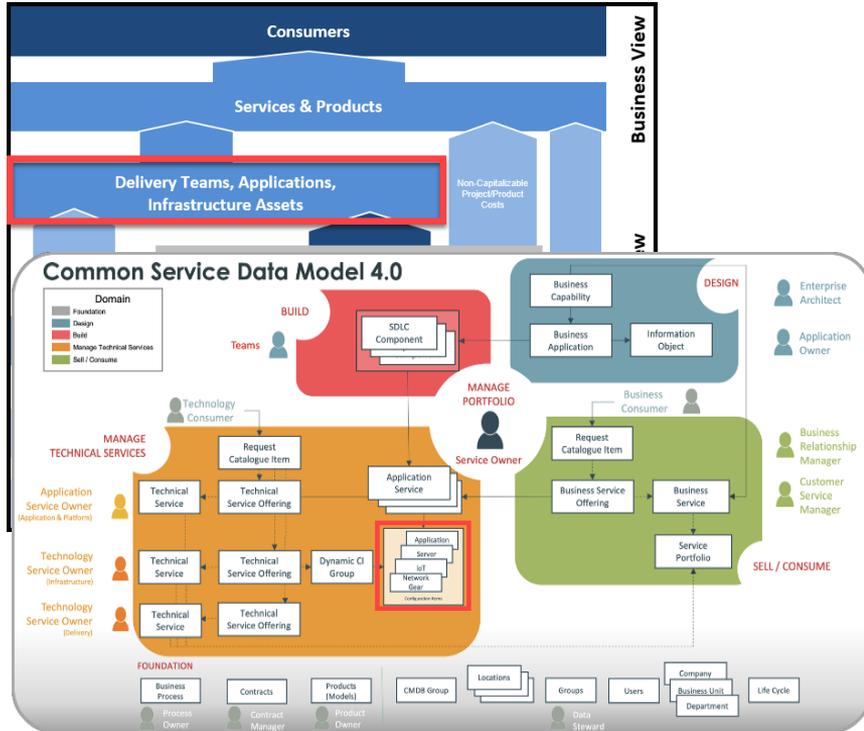
- TBM Scientist

Recommendation #7

Retain your product hierarchy, if established, and map your products into the TBM Solutions Taxonomy.



Infrastructure Assets



TBM

SNow CSDM: CMDB Table

Data Center

`cmdb_ci_datacenter`

Network

`cmdb_ci_netgear`

Storage

`cmdb_ci_storage_device`
`cmdb_ci_storage_server`
`cmdb_ci_storage_volume`

Mainframe

`cmdb_ci_mainframe`
`cmdb_ci_mainframe_lpar`

Servers

`cmdb_ci_server`

Database

`cmdb_ci_database`
`cmdb_ci_db_instance`

NOTE: Review documentation for your TBM/IFM tool or, if using Apptio tools, review Help documentation titled "DataLink ServiceNow Ingress connector" for more information.

- "Common Service Data Model Domains." *ServiceNow Product Documentation*, ServiceNow, <https://docs.servicenow.com/bundle/tokyo-servicenow-platform/page/product/csdm-implementation/concept/csdm-domains.html>.

Success of TBM depends on the success of existing systems of record.

Likewise, existing systems are substantially improved by adopting TBM practices.

ServiceNow Definitions

What is a Service?

An **Application service** is a service type that is a logical representation of a deployed system or application stack.

(cmdb_ci_service_auto)

Key Details

- An Operational CI
- Focus in Incident, Problem, Change (IPC)
- Unique Instance of an Application
- May be created per "Environment" ex. Dev, QA, Prod
- May be created per region
- Creation Methods: Manual Mapping, Service Mapping with Entry Point, Tags, Dynamic Query

A **Business Service** is a service type that is published to *business users* and it typically underpins one or more business capabilities.

(cmdb_ci_service_business)

Key Details

- One level, not a hierarchy of Business Services
- An Operational CI
- Used for impact in Incident, Problem, Change (IPC)
- Used for Approvals for Change
- Should be Consumer or Sell focused

A **Technical Service** is a service type that is published to *service owners* and typically underpins a business or application service.

(cmdb_ci_service_technical)

Key Details

- One level, not a hierarchy of Technical Services
- An Operational CI
- Used for impact in Incident, Problem, Change (IPC)
- Should be Provider focused: the technology **provided** for the business to **consume** or **Sell**

Which Application?

An **Application** is any deployed program, module or group of programs, that is designed to provide specific functionality on a compute infrastructure. The installed bits & bytes.

(cmdb_ci_appl)

Key Details

- An Operational CI
- Used in Incident, Problem, Change (IPC)
- Discoverable installation of code communicating over a particular port
- Unique deployment of an Application on a particular host
- Ex: Database Instances, Java, Websphere, Tomcat

A **Business application** represents all software and infrastructure environments (Dev, Test, Prod) configured to provide business functionality

(cmdb_ci_business_app)

Key Details

- Inventory of Application (Portfolio)
- **NOT** an Operational CI
- **NOT** used in Incident, Problem, Change (IPC)
- **NOT** Version specific
- Contains Meta data about the Business Application

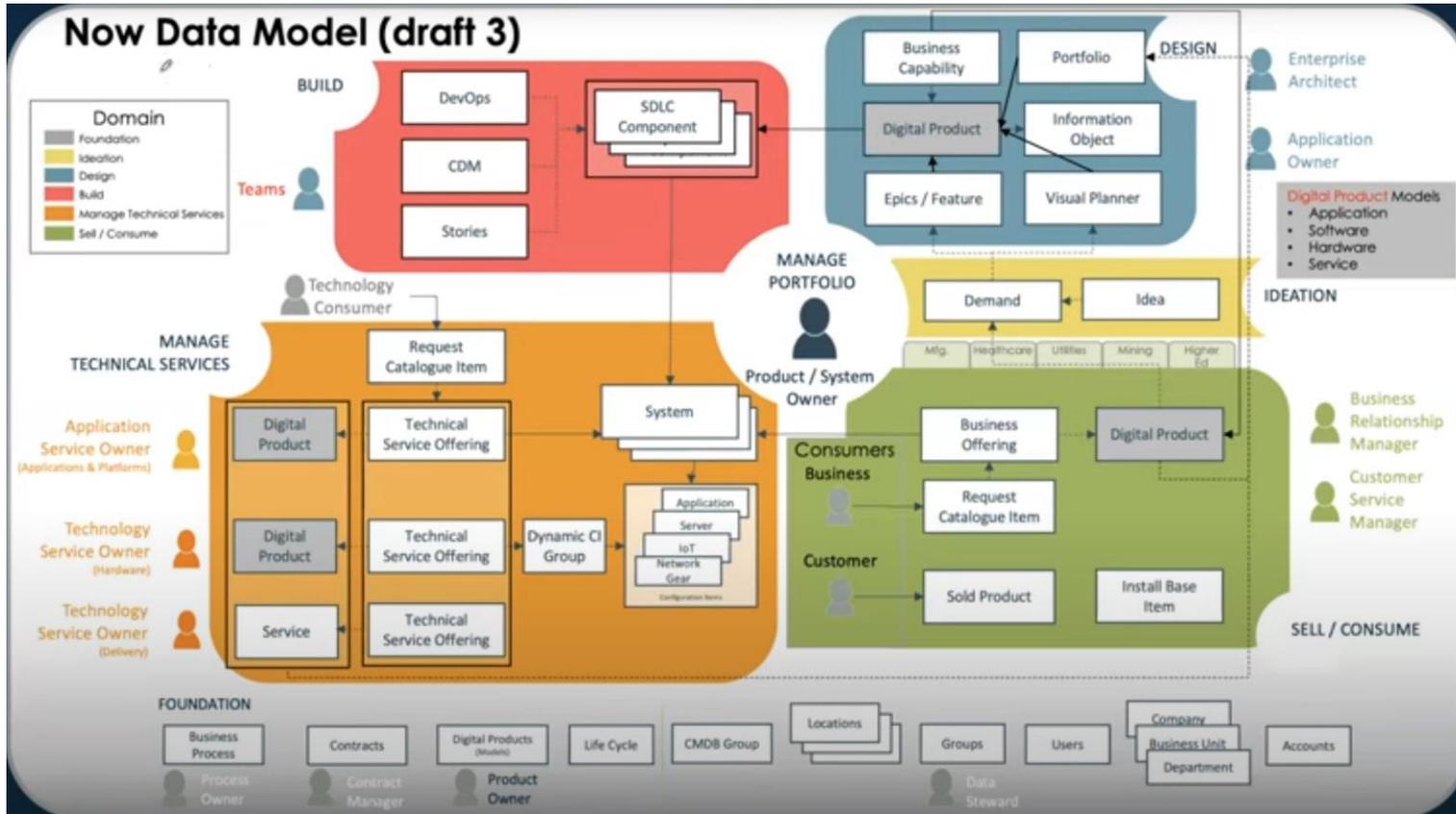
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(cmdb_ci_service_auto)

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- May be created per "Environment" ex. Dev, QA, Prod
- May be created per region
- Creation Methods: Manual Mapping, Service Mapping with Entry Point, Tags, Dynamic Query

- Lemm, Scott. "CSDM 4.0 Draft White Paper." ServiceNow, 18 Jan. 2022.



- Bodman, Mark. "Office Hour 52 - APM: CSDM v4.0 and APM." YouTube, ServiceNow, 13 Jun. 2022, <https://www.youtube.com/watch?v=6MrekgoQ4A>.



Thank you for joining today!